

Gifts of Securities/Stock/Mutual Fund Shares

Be sure to follow these instructions when making a gift of securities, stock or mutual fund shares to the YWCA of Greater Milwaukee. Doing so is necessary to assure that your gift is processed in a timely manner and is directed as you wish.

Very important. The steps below are **in addition** to those you take when consulting with your professional advisor to determine the potential tax consequences of making such a gift.

Notify us before making the gift.

Call us to let us know that you are interested in making a gift of stock, securities or mutual fund shares, the specific property you will contribute, the number of shares and the name of the issuing company or mutual fund. You can reach the Fund Development Office at (414) 267-3222.

Please note: According to IRS requirements, the date and value of your gift are determined by the date on which the YWCA of Greater Milwaukee takes control of the securities, stock or mutual fund shares.

How to transfer securities, stock or mutual fund shares to the YWCA of Greater Milwaukee.

1. Publicly traded securities held in a brokerage account.

Send your broker a letter of authorization, specifying the securities to be transferred and purpose of your gift, e.g., “to support the mission of the YCWA of Greater Milwaukee.” (Click here for sample “1”.) Send a copy of this letter to the YWCA of Greater Milwaukee Fund Development Office (see address below). Securities may be transferred electronically, directly to the YWCA of Greater Milwaukee’s account with [insert brokerage], as listed below. Electronic transmission will minimize sales and administrative costs.

[insert brokerage and contact name] DTC number: _____

YWCA of Greater Milwaukee account number is: _____

If your broker has questions or cannot transfer the stock electronically, call us and we will be happy to help you to complete your gift.

2. Publicly traded stock held in certificate form.

If you...

- want to contribute all shares represented by a certificate registered in your name, please mail the unsigned stock certificate to the YWCA of Greater

Milwaukee with a letter of instruction identifying the securities you are contributing and the purpose of your gift, e.g., “to support the mission of the YWCA of Greater Milwaukee.”

- Plan to mail the unsigned stock certificate, please mail a signed stock power form in a separate envelope. (Click here for sample “2”.) We recommend each envelope be mailed with a signature required for delivery.
- wish to provide the certificate in person, we will have you execute these documents when you are at our offices.

Fund Development Office
YWCA of Greater Milwaukee
1915 N. Martin Luther King Jr., Drive
Milwaukee, WI 53212

If you plan to contribute a portion of the shares represented by your stock certificate, please contact us for specific directions at (414) 267-3222.

3. **Mutual Fund Shares.**

In order to process gifts of mutual fund shares, your shares must be re-registered in the name of the YWCA of Greater Milwaukee. First, send your mutual fund company a written request, signing the letter exactly as your name appears on your account. Second, send a copy of that letter to the YWCA of Greater Milwaukee’s Fund Development Office. Please be sure to include all of the following information in your letter:

- your account number
- the number of shares
- the name(s) of the specific fund(s) to be transferred
- your Social Security number(s)
- the intended purpose of your gift
- the YWCA of Greater Milwaukee’s address and tax identification number, which are...

YWCA of Greater Milwaukee
1915 N. Martin Luther King Jr., Drive
Milwaukee, WI 53212

Tax identification number: 39-0806258

Please check with your mutual fund company for its specific requirements. For example, some mutual fund companies require a Form W-9 (Request for Taxpayer’s ID and Certification) signed by the YWCA of Greater Milwaukee.

For further information about these types of gifts or gifts of other types of property, please contact the Fund Development Office at (414) 267-3222.

Sample 1
Letter of Authorization to Broker

[insert date]

[insert broker's name]
[insert company name]
[insert address]
[insert City State & Zip]

Re: Authorization to transfer securities to the YWCA of Greater Milwaukee
Tax Identification Number: _____

Dear _____:

Please transfer to the YWCA of Greater Milwaukee the following securities:

I wish the securities to be transferred electronically to the YWCA of Greater Milwaukee's account at [insert brokerage firm information]. The contact person is [insert name] at [insert telephone number].

Broker's DTC number: _____
YWCA of Greater Milwaukee's account number: _____
Broker: [insert name and contact information if different from that noted above]

The gift is to support the mission of the YWCA of Greater Milwaukee. [If gift is restricted, insert name of program or specified purpose here.]

I wish these securities to be transferred without delay upon receipt of this authorization letter [or insert specific instructions regarding timing of transfer].

Sincerely,

Signature

Account number: _____

Print Name

Telephone number: _____

cc: YWCA of Greater Milwaukee (mail or fax: (414) 374-2680)

Sample 2
Irrevocable Stock Power

I/we, __[insert names(s) of owners as listed on stock certificate] _____
_____, hereby transfer and assign unto the
YWCA of Greater Milwaukee, _____ shares of the _____ stock of
_____ represented by Certificate(s) Numbers: _____
inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned hereby irrevocably constitute and appoint [insert broker],
attorney to transfer the said stock on the books of said Company, with full power
of substitution in the premises.

Signature _____

Print Name _____

Date _____

Signature Joint Owner (if any) _____

Print Name of Joint Owner _____

Date _____